



Tourism and Recreation Strategic Plan 2008-2012

**Tourism Advisory Council Meeting
June 6, 2007**

Good Morning!

Lorraine Hingston Roach, President

Anna Holden, Project Manager

Kara Harder, Director of Research

The Hingston Roach Group, Inc.

Kate McMahon, President

Applied Communications, Whitefish

Gail Brockbank, President

Premier Planning, Helena

Clint Blackwood, Helena



Agenda

Strategic Plan: Draft Sections

Key Issues

Actions

Next Steps: Timeline for Final Plan

Strategic Plan Purpose

- Priorities to focus resources
 - Promotion, Product, Partnerships
- Blueprint for strategic, integrated approach
- Responsibilities for implementation
- Funding sources to pay for actions
- Measures of results

Strategic Plan Process

1. Information-gathering (Oct-Feb)
2. Development of Draft Vision, Goals, and Actions (Feb-Mar)
3. Refinement of Actions (Mar-April)
4. Draft Strategic Plan (April-June)
5. Public Comments and Final Plan (Jul-Sep)

Themes

- Promotion
- Product
- Partnerships



Strategic Plan: Draft Sections

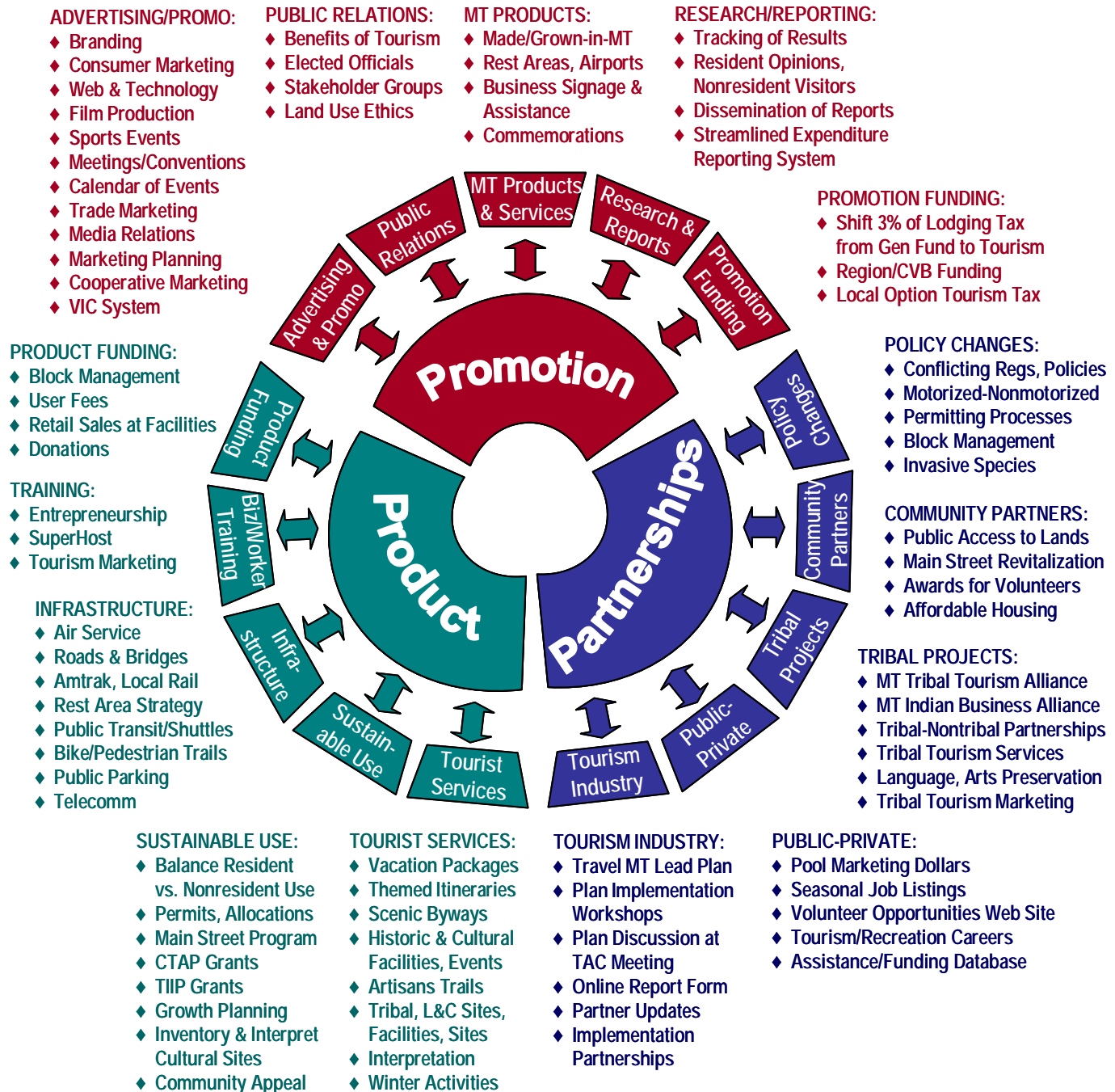


Intro – Trends – Markets (p 1-13)

- Old Plan - 66 pages; New Plan - 13+ pages
- Tourism as Economic Development
- Affected by national, state, global trends
- SWOT – any additions?
- Target Markets (key issues discussion)
- Link to Travel MT Marketing Plan

Strategy for 2008-2012 (p. 17-24)

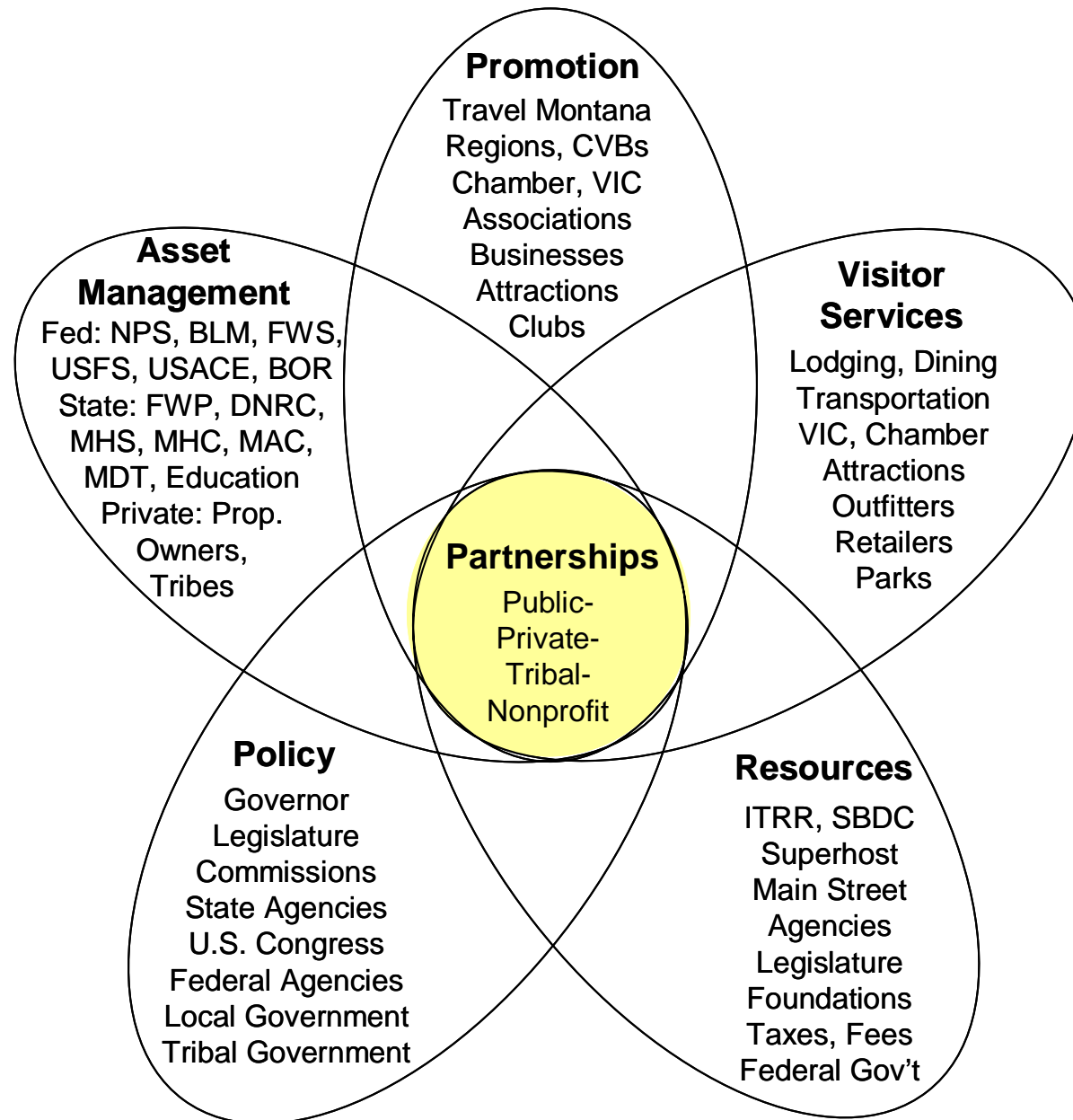
- Vision
- Guiding Principles
- Assumptions
- 10 Goals
- Strategic Framework
- Actions to Achieve Goals
- Implementation & Partnerships



Keys to Success:

- Strong commitment from highest levels of government in Montana
- Visionary leadership from Travel Montana, TAC, and TIAM
- Resources of staff time and money focused on high priority actions

Tourism Plan Partners and Their Areas of Responsibility



Actions for 2008-2012 (p. 25-85)

- Reformatted for 2008-2012 Strategic Plan
 - Actions listed by sector
- Based on input from public meetings, February TAC meeting, Region/CVB meeting, MTRI meeting, interviews, MTTA meeting, survey, Governor's Conference
- Updated from Governor's Conference version
- Each section can be used as a stand-alone (4-8 pgs)
- Descriptions for each action (vs. pgs 21-23)
- Missing from previous Plan: ways to measure results
 - Add matrix to Implementation section

Actions for 2008-2012 (p. 25-85)

■ TM & TAC actions	26
■ Region & CVB actions	33
■ Business & Property Owner actions	41
■ Nonprofit Organization actions	49
■ Research, Education & Workforce actions	54
■ MTTA, Tribal, & Local Government actions	57
■ Fish, Wildlife & Parks actions	65
■ MHS, MAC, Dept of Ag, & DOC actions	70
■ Transportation actions	77
■ Federal Agency actions	81

Appendices

- Resources (funding, technical assistance)
- Reference materials
- Montana Code Annotated 15-65
- Public meeting input
- Survey instrument and results



Key Issues



Key Issues

- Niche Markets
- Organization & Roles
 - TAC, TM, Regions/CVBs
 - MTRI
- VIC system
- Funding

Important Niche Markets (p. 13)

Niche Markets	Percent
Wildlife viewers	71.9%
Anglers	70.5%
Photographers	68.4%
Adventure travelers	68.1%
Scenic drivers	62.3%
Cultural and heritage travelers	61.4%
Bird watchers	58.8%
Hunters	56.7%
Weddings, reunions	54.6%
Geo/eco-tourists, wilderness visitors	53.9%

Niche Markets	Percent
Skiers, snowboarders, snowshoers	41.2%
RVers or campers	41.2%
Snowmobilers	37.0%
Geologic, scientific travelers/groups	36.8%
Golfers	36.5%
Education, Volun-tourism	32.8%
Elderhostel groups	28.1%
Snowbirds	26.9%
Geocachers, tech-savvy travelers	25.1%
Team-building, affinity groups	24.8%
Dinosaur buffs	24.4%
Home school group educational tours	23.7%
Train buffs	22.0%
Private pilots associations, clubs	21.5%
Pow Wow competitors, musicians	18.5%

Niche Markets		Custer	Glacier	Gold West	Missouri River	Russell	Yellowstone	
→	Adventure travelers	33.3	77.3	70.9	35.7	59.3	77.8	
→	Anglers	50.0	77.3	83.6	57.1	44.4	77.8	
→	Bird watchers	41.7	64.7	63.6	78.6	48.1	58.6	
→	Cultural and heritage travelers	66.7	61.3	67.3	50.0	64.8	56.6	
	Dinosaur buffs	36.1	16.8	21.8	71.4	31.5	17.2	
	Education, Volun-tourism	38.9	36.1	43.6	35.7	29.6	23.2	←
	Elderhostel groups	22.2	26.9	45.5	7.1	35.2	23.2	
→	Geo/eco-tourists, wilderness visitors	36.1	58.8	61.8	35.7	42.6	56.6	
	Geocachers, tech-savvy travelers	22.2	26.9	36.4	7.1	16.7	21.2	←
	Geologic, scientific travelers/groups	25.0	38.7	40.0	42.9	35.2	37.4	←
	Golfers	25.0	53.8	40.0	21.4	31.5	29.3	←
→	Groups of women	30.6	58.0	50.9	28.6	40.7	53.5	
	Home school group educational tours	33.3	18.5	29.1	14.3	33.3	20.2	←
	Horse, rodeo enthusiasts	44.4	39.5	52.7	57.1	42.6	45.5	←
→	Hunters	58.3	47.1	60.0	78.6	63.0	54.5	←
	Meetings, conventions, incentive	27.8	45.4	36.4	42.9	46.3	47.5	←
→	Motorcyclists	38.9	42.9	54.5	64.3	50.0	41.4	
→	Photographers	52.8	69.7	76.4	71.4	57.4	71.7	
	Pow Wow competitors, musicians	22.2	22.7	16.4	42.9	22.2	8.1	←
	Private pilots associations, clubs	11.1	26.1	21.8	28.6	16.7	21.2	←
	RVers or campers	33.3	40.3	50.9	57.1	48.1	31.3	←
→	Scenic drivers	50.0	68.9	74.5	50.0	46.3	65.7	←
	Skiers, snowboarders, snowshoers	13.9	47.9	45.5	0.0	18.5	60.6	←
	Snowbirds	11.1	26.1	47.3	21.4	25.9	24.2	←
	Snowmobilers	11.1	38.7	47.3	7.1	16.7	42.4	←
	Team-building, affinity groups	16.7	30.3	23.6	21.4	27.8	22.2	←
	Train buffs	13.9	27.7	29.1	21.4	16.7	17.2	
→	Weddings, reunions	38.9	66.4	56.4	50.0	44.4	61.6	
→	Wildlife viewers	55.6	80.7	78.2	71.4	48.1	79.8	
	n counts	36	119	55	14	54	99	

Issue: Marketing to Niches

- Vertical and horizontal integration of strategies:
 - State, region, community, business/attraction, cross-region, cross-state/province
 - Web, print/electronic media, fulfillment, special promotions, packages, events, etc.
- Ex: Birders
 - Designated birding trails
 - Ad/PR campaign: Wildbird, Audubon, club newsletters
 - Fulfillment materials: Life List check-offs, etc.
 - In-store promotions: birding supply stores
 - Off-peak season packages, guided trips/tours
 - Birding events/festivals

Niche: Geotourists

- Statewide target market?
- Adopt geotourism principles statewide?
- Sign a geotourism charter?

The 100-year Business Plan...

Geotourism

- Sustains or enhances the geographical character of the place being visited: environment, culture, aesthetics, heritage, and well being of residents
- Focuses not just on “tourist satisfaction,” but on “tourist enthusiasm”
- Emphasizes the distinctiveness of locale, beneficial to visitor and resident alike
- Focuses on:
 - Market selectivity: “high yield” segments
 - “Geo-tourists” vs. “ego-tourists”
- Evaluates based on quality instead of quantity (high value tourists versus “body counts”)

Geotourism Principles, Charter

- Community involvement: encourage local partnerships to promote and provide a distinctive, honest visitor experience.
- Community benefit: encourage small to medium businesses, strategies that emphasize economic and social benefits to community, and destination stewardship to maintain benefits.
- Protection and enhancement of destination appeal: sustain natural habitats, heritage sites, aesthetic appeal, and local culture.
- Land use: anticipate development pressures, apply techniques to prevent overdevelopment and degradation.
- Evaluation: conduct regular evaluations by independent panel of stakeholder interests, publicize evaluation results.

Priority Markets for 2008-2012?

- Geographic, Demographic, Niches
- Compare to:
 - Strategic Plan markets 2003-2007
 - Travel Montana draft Marketing Plan
 - ITRR data
 - National/global trends (TIA, Prizm, etc.)
- Need further discussion with TM, ITRR, ad agency, regions/CVBs
- Feedback??



Key Issues (cont'd)



Issue: Organization & Roles

- TAC
- Travel Montana
- Regions
- CVBs
- MTRI
- MTTA
- TIAM

Tourism Advisory Council

- Advise Dept. of Commerce re. tourism
- Advise Governor re. significant matters relative to travel industry
- Direct university system re. travel research
- Approve travel research programs
- Encourage regions to promote Indian reservations
- May modify tourism regions based on trends
- Oversee distribution of funds to regions/CVBs
- Prescribe allowable admin expenses

**Visionary
Leadership**

Travel Montana

- Statewide tourism promotion strategy
- Measurement/reporting of results
- Coordination of partnerships
- Technical assistance for stakeholders
- Collaboration with other agencies
- Tourism development grants
- Oversee VICs
- Film office
- Administer funding program

**Visionary
Leadership**

Regional Tourism Organizations

- Promotion of geographic regions as destinations (link to traveler behavior/interests)
- Identification of target markets, niches
- Coordination of partnerships, co-op projects
- Visitor services: 800#, web site, fulfillment, VIC funding
- Encouragement of product development
- Address key issues that affect tourism
- Advocate for tourism industry
- Tension between specific identity and messages vs. “all things to all people”

CVBs

- Promotion of specific city or resort area
- Identification of target markets, niches
- Coordination of promotion partnerships
- Tracking of specific bookings and ROI
- Conference and meeting services
- Group and event services
- Visitor services: 800#, web site, fulfillment, management of local VIC, reservations, etc.
- Accountable for lead generation, distribution, bookings, reporting to membership

MTRI

- Inter-agency collaboration and coordination (state, federal, tribal, TAC)
- Address issues affecting tourism
- Implement inter-agency projects
- Tension between tourism priorities and other priorities (land management, public safety, noxious weeds, grazing leases, timber management, etc.)
- **Issue**: reluctance to take lead on actions, need directive/guidance from TAC, Governor

MTTA

- Coordination of tribal tourism efforts and projects/initiatives
- Link with Travel MT, regions, MTRI, MIBA
- Capacity-building for tourism efforts of individual tribes
- Advocacy for tribal tourism issues and needs
- **Issues**: need for resources to implement priority projects, more partnerships between tribes and regions/CVBs

TIAM

- Advocacy for tourism industry issues/concerns
- Consensus-building forum to address issues, initiate policy changes
- Networking and communication across segments of tourism industry
- Tension between interests of entire industry vs. interests of individual segments (lodging, dining, beverage, ski areas, outfitters, etc.)
- **Issue**: need for increasingly stronger voice to influence policy with statewide, cross-segment consensus

Issue: Visitor Information System

- Web sites: linkages between state, regional, CVB, other agencies and organizations (branding, consistent messaging)
- Promotion materials
- Electronic information systems (TIS, 511, AM 1610, podcasts, etc.)
- VICs: public, private, nonprofit, tribal
- Businesses & attractions
- **Issue**: need better “system” that is integrated and committed to service, cross-promotion

VICs

- Part of marketing program
- Key services:
 - Information, reservations, etc.
- Key questions:
 - Staffed vs. kiosks/electronic
 - Location: where and what type make sense?
 - Funding
 - Criteria for support
 - Accountability
- Training, cross-promotion, linkages

Issue: Funding

- Distribution and ROI on 4% funds
 - Streamline region/CVB distribution and administration process → reduce paperwork
- Future strategy for 3% funds?
- Leverage private funds (co-ops, sponsorships, BIDs, etc.)
- Leverage other partners and funding sources (federal, state, foundation, etc.)
- **Issues**: Need to continue improving strategic targeting of funds (rifle vs. shotgun), leveraging; reduce information clutter and advertising chaos

Spending on Advertising/Mktg

- 420 respondents to survey question:
 - \$11 to \$21 million total spent annually
 - \$5 to \$12 million spent to attract out-of-state visitors
- Multiplied by 7 = \$35 to \$84 million spent to attract nonresident travelers
 - Opportunity to leverage dollars



Key Actions



TAC Actions

- Advise on vision, issues
- Branding initiative
- Links to Gov, TIAM, MTRI, MTTA
- Review and streamline region/CVB funding rules, regulations and policies

Travel Montana Actions

- Annual Marketing Plan meeting w/ regions, CVB, state, fed, tribal partners
- Branding initiative
- Increased tracking/reporting
- Enhanced VIC system
- Coordinate meeting/convention presence, web site
- Interactive events calendar
- Training workshops/outreach to stakeholders, MEDA, MACO, MLCT, etc.

Region Actions

- Enhance targeting, tracking, reporting
- Improve regional VIC linkages
- Build organization capacity: Board and staff development
- Track growth management and other issues
- Inform elected officials about activities, results, economic impact

CVB Actions

- DMAI membership/certification [HANDOUT]
- Attract meetings/events
- Link to arts/culture/economic development organizations
- Track growth management and other issues
- Inform elected officials about activities, results, economic impact

Other Actions

- Business and Property Owners
 - Nonprofit Organizations
 - State Agencies (FWP, MHS, MAC, DOC, MDT)
 - MTTA, Tribal and Local Governments
 - Federal Agencies
-
- DROP ANY ACTIONS??
 - MISSING ACTIONS??



Next Steps



Timeline for Final Plan

- June-July: refinements, clarify MTRI role
- July: send revised draft to TM, TAC, MTRI, MTTA, Regions, CVBs, TIAM for review
- August: comments from partners
- August: final draft to web site for public comment period; email and media notices
- September: final revisions, final Plan to TAC, MTRI, MTTA, Regions, CVBs, TIAM
- October: adoption of final Plan at TAC meeting

In Summary...

- Success in tourism and recreation from now until 2012 depends on commitment:
 - Strategic, targeted **PROMOTIONS**
 - Enhanced, sustainable **PRODUCT**
 - Effective, win-win **PARTNERSHIPS**
- Everyone has a role to sustain Montana's brand as a "Top 10 Destination" globally
- Success will benefit not only tourism, but also quality of life for all Montanans!

Don't miss the opportunity!!

- Send your comments, criticisms, and additions ASAP: Iroach@thrgroup.com

THANK YOU!!

Project web site:

www.travelmontana.state.mt.us/2008strategicplan/index.asp